



## August SDR Round

The August SDR round is traditionally the easiest. Your curriculum should have been sorted out for the April round and you don't have the problem of the year end hassles and summer holidays that coincide with the December round. Nevertheless the best advice we can give you is to get your SDR done as soon as you can. Do it on the 1<sup>st</sup> of September and then you will be able to sit back and relax.

Here are some tips:

- Make sure that all withdrawals up to 31 August have been processed.
- Make sure all students have an NSN and an active NSI status.
- Make sure that all NSI change notifications have been processed – see Take2 Tip Sheet 29 for more information.
- Make sure that all course enrolments with a finish date before 31 August have either a final course completion code (2, 3, or 4) or have an extension code (0) – if applicable.
- Record all qualification completions.
- Remember to enter forecast EFTS on the STEO site once you have validated successfully and before you submit your SDR.
- Keep a copy of all of the following:
  - The SDR audit reports produced by Take2 for the SDR files that were submitted.
  - The five SDR files that you submitted.
  - The summary reports that you print out for the STEO web site, sign, and fax to the Ministry.

Above all – do the SDR as soon as possible!

## GST

As you know GST increases on 1 October. How does this affect Take2?

- If you use the fee export process in Take2 it will, by default, include GST. On 1 October go to the *Site Details* form in the Administration Module and change the rate to 15%. Enter "0.15" to do so.
- If you use any other fee export process

developed by Meta Office you also will need to change the GST rate in the same way.

- SAC funding rates are stored in the *External Lookups* in the Administration Module under *Curriculum > Category*. TEC publishes these rates exclusive of GST and so you don't need to change them in Take2 – provided you have been storing the rates exclusive of GST.
- At some point between 1 October and 31 December you will have to modify all course tuition and compulsory course cost fees to reflect the increase in GST. We have asked the TEC Service Centre when they want this doing and, to date, we have received only quite incomprehensible and inaccurate advice which was promptly contradicted by the Ministry. Once we do get some sensible directions, though, we will provide our clients with a tool to change fees globally in Take2 for all courses. Remember, though, that Foreign Fees are stored exclusive of GST in Take2 and the TEC Course Register.



Co-operation? Hm.....

## 2011 Enrolment Form

There are no SDR, TEC, or NZQA data collection changes of which we are aware that will affect your enrolment form in 2011.

You can therefore continue to use your current form design and the most recent template on our web site is still valid. The template is designated as version 13.01 for the 2010 year. It is valid in 2011 as well.

## Top Tips – SDR Validation Errors

When validating your SDR files on the STEO website it is not unusual to get some errors. Given that there are currently 596 possible error and warning codes this should be no surprise. As an aside, doesn't that number make you wonder about the current design of the SDR? There has to be a better way.

Anyhow, back to those errors. We find that that of the hundreds of possible errors only a handful occur with any regularity and so the following notes may be of some assistance to you.

**Error 366 - COMPLETE must be 4 if CRS\_WTD is not null.** Plain English translation: you have reported a course completion code that is not "4" for a course enrolment for which an withdrawal date exists. Check the *Enrolment Details* form. This is where you can fix the problem by either changing the course completion code to "4" if the student did actually withdraw from this course, or by removing the withdrawal date if the student did manage to get an outcome before withdrawing or did not withdraw at all.

The screenshot shows the 'Course Enrolment' form with the following fields and values:

- Prescribed Code: YW3-16843
- Offered Code: 16843-09
- Title: Demonstrate knowledge of the meaning of Te Tiriti o Wai
- Start Date: 15/09/2009
- Finish Date: 04/12/2009
- Status: C
- Funding: 01
- Site: 10
- Category: A1
- Classification: 03
- Attendance: 1
- Assistance: 00
- NZSCED: 090505
- Updated: 09/12/2009
- Withdrawal Date: 31/10/2009 (highlighted)
- Course Completion: 2 (highlighted)
- EFTS: 0.0250
- Residency: N
- Enrolment Event: 7648

**Error 383 - COMPLETE is 1, 2, 3 or 4, CRS\_END date is 2004 or greater and no corresponding enrolment is found.** Plain English translation: you are reporting a course completion record for which the Ministry can find no matching course enrolment record.

This is a tricky one and causes confusion. Our experience is that the error message is always true – no matching course enrolment has been reported through the SDR. The confusion has arisen because when the provider in question looks in Take2 they have found the enrolment. Provider has enrolment. Ministry doesn't have enrolment. Stand-off. We have surmised that there are three possible causes.

- In the first case the course completion is being reported for a course enrolment from an earlier year. Say the course completion is being reported in August 2010 because a completion date of July 2010 has been recorded but the underlying course enrolment was in the 2009 year. Then say that the underlying course enrolment had not been added to Take2 until after the December 2009 and SDR had been submitted. Bingo, that's your problem.
- The second case is where the underlying course enrolment did exist in the earlier year but had not been reported via the SDR because, for example, the student had been tagged as inactive or the funding source for the enrolment had been set to "ZZ" – both these conditions having the effect of excluding data from the SDR. Then, come 2010 the condition has changed – student is switched back to active or funding source is changed to "01" – and a course completion is recorded and reported.

In either of the above cases you could theoretically ask to re-submit an SDR for the earlier year and, in doing so, make sure that it contained the underlying course enrolment. This is not likely to make you very popular with the Ministry who have had to put up with multiple resubmissions as a result of TEC's EPI nonsense. The other option is to suppress the reporting of the course completion in the current SDR, which you can do quite simply by changing the funding source to "ZZ".

The screenshot shows the 'Course Enrolment' form with the following fields and values:

- Prescribed Code: YW3-16843
- Offered Code: 16843-09
- Title: Demonstrate knowledge of the meaning of Te Tiriti o Wai
- Start Date: 15/09/2009
- Finish Date: 04/12/2009
- Status: C
- Funding: ZZ (highlighted)
- Site: 10

- The third possible cause of error 383 is where the start and/or finish date that was reported in the course enrolment has been changed in Take2 by the time the course completion is reported. Both dates are used in the matching process and so no match is made. This can be fixed by checking what dates were reported in the original course enrolment record and updating the record in Take2 to these dates so that the course completion record can be matched.

**Refer to our May Newsletter for information on other common SDR errors.**